



# ENERGY STAR® Portfolio Manager Upgrade: Frequently Asked Questions

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## 1. Why is EPA's ENERGY STAR upgrading Portfolio Manager?

In the spring of 2013, EPA will launch a comprehensive upgrade for its popular Portfolio Manager tool. Originally released in 2000, Portfolio Manager has experienced tremendous growth in users and capabilities. This tool, currently in use by more than 40,000 individual accounts to measure, track, assess, and report on the energy and water performance of more than 250,000 commercial buildings, is being completely upgraded to:

- optimize the database architecture;
- streamline system processing;
- modernize web services; and
- improve the user interface.

## 2. Will data I'm currently entering into Portfolio Manager be transferred into the upgraded system?

Yes. All the information entered by users into Portfolio Manager will be automatically transferred to the upgraded tool. There is no reason to wait to begin benchmarking your buildings, or to halt updating data for already benchmarked buildings. Continued tracking of your energy and other data provides valuable information for managing energy at your property.

EPA is developing a data migration process; the process includes matching up database structures and mapping data from the current system to the new system. Shortly before the launch of the upgraded tool in the spring of 2013, Portfolio Manager will be brought offline to ensure a successful migration of the data. Users will be provided with ample notice, and any information needed to prepare for this transition.

## 3. What are a few of the enhancements that I can anticipate in the upgraded Portfolio Manager?

EPA will hold quarterly webinars and will show different aspects of the upgraded tool as features are built. Examples of planned enhancements include:

- "Add a property" and "add a meter" wizards to simplify data entry;
- Streamlined "editing" features to allow editing of multiple building characteristics and/or meters on a single screen;
- Easier-to-generate reports, including greater flexibility to download characteristics and metrics for buildings and/or portfolios into MS Excel;
- More options for "sharing" properties with other users; and
- Added checks, alerts, and tips to help users ensure data accuracy.

#### **4. Where can I get more details on planned changes to specific features**

At this time, EPA is still developing final system requirements and specifications. Therefore, detailed information about the display and functionality on each page is not currently available. Please attend our quarterly webinars and check the Portfolio Manager Upgrade web page ([www.energystar.gov/PMUpgrade](http://www.energystar.gov/PMUpgrade)) regularly to see the most detailed information available.

#### **5. How will the Portfolio Manager upgrade impact automated benchmarking services for both energy information service providers and their customers?**

As part of the Portfolio Manager upgrade project, automated benchmarking services (ABS) will also receive a new underlying architecture and technology set. This will include a move from SOAP- to REST-based services, easier schema definitions, quicker responses, easier integration, and improved user interface.

ABS providers will not be able to use the current SOAP-based services (XML Schema) once the upgrade launches. EPA has held multiple webinars with ABS providers to discuss planned changes (see recordings at [www.energystar.gov/ABS](http://www.energystar.gov/ABS)) and will continue to host such webinars. Final ABS web service definitions will be shared with ABS providers 6-9 months in advance of the launch, to allow ABS providers enough time to build their integration.

#### **6. Will additional building types be incorporated into the upgrade?**

The building types for which ENERGY STAR scores are currently available will not change. However, the upgraded Portfolio Manager will include 80 – 90 space types for selection, such as stadiums, convention centers, and more. These spaces will be treated in the same way that the “Other” space type is currently treated, but will offer users more specific and accurate categorization for comparison.

To develop a score scale, a robust, random sample of building data from across the country is required, which may not currently exist for the particular building type.

#### **7. Will Portfolio Manager continue to use 2003 CBECS data as the reference population for the 1-100 energy performance score systems?**

EPA has used published data from CBECS 2003 to create the ENERGY STAR energy performance scales housed in Portfolio Manager. Based on these periodic CBECS surveys, EPA has found that the key drivers of energy use in commercial buildings have remained largely consistent over the past 10 years. In the absence of more current CBECS data, users of the ENERGY STAR energy performance scales should have confidence that:

- The ENERGY STAR scales remain the best representation of commercial building energy performance in the market.
- CBECS 2003 continues to be the best source of industry data.

- EPA will monitor the progress of CBECS 2011 and continually evaluate the accuracy and reliability of the ENERGY STAR energy performance scales.
- EPA will work to develop alternative methodologies if deemed necessary or beneficial.

Given the importance of continued and reliable measured energy data such as that provided by CBECS, EPA plans to evaluate longer term options and partnerships to ensure that data is available to inform critical energy policy. Currently, four of the 15 space types eligible to receive an ENERGY STAR score in Portfolio Manager were developed using non-CBECS data.

#### **8. Does Portfolio Manager offer an accurate measure for energy performance of international sites?**

International buildings can, and do, use Portfolio Manager to effectively benchmark energy performance. International buildings are entered as they would be if they were located in the United States. A few important notes follow:

- Tracking changes in energy and cost over time can be accomplished effectively for any building, no matter the location.
- Weather normalization depends on accurate weather data, and for some countries, EPA only has access to data from one to two weather stations. When entering a building, select the closest city to you that is available in Portfolio Manager. The closer your building is to the city you select, the more accurate the weather normalization.
- If the building receives a 1-100 score, it is being compared against U.S. building stock.
- Source energy conversion factors and greenhouse gas emissions factors are U.S. factors.

#### **9. What is the status of EPA's partnership with Natural Resources Canada to expand Portfolio Manager to commercial buildings in Canada?**

EPA and Natural Resources Canada (NRCan) signed a formal agreement in September 2011 to expand Portfolio Manager to Canadian buildings. Currently, Canadian buildings are benchmarked against similar buildings in the U.S., but they will be benchmarked against similar Canadian buildings and will have Canadian-specific source energy and greenhouse gas emission factors when the upgraded Portfolio Manager is launched in spring of 2013.

As part of working with the Canadian government, EPA will add a large number of Canadian weather stations to allow Portfolio Manager to more accurately normalize for weather conditions in Canadian locations. Currently there are data for only six Canadian weather stations incorporated in Portfolio Manager, for the major Canadian cities.

Initially, Canadian-specific energy performance scores will be available for two building types, with NRCan intent to add more in the future. While 1-100 scores will be available for Canadian buildings, the ENERGY STAR certification will not be offered.

## 10. Will the Portfolio Manager upgrade also impact Target Finder?

Updates will also be made to EPA's Target Finder interface. In addition, it will be possible to save Target Finder results in Portfolio Manager to enable users to easily set energy targets and receive an EPA energy performance score for projects during the design process, and then transition to benchmarking actual energy performance upon project completion.

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To learn more about the Portfolio Manager upgrade project, visit [www.energystar.gov/PMupgrade](http://www.energystar.gov/PMupgrade).

To learn more about how calculations, such as emissions, weather normalization, and the ENERGY STAR score, are currently performed in Portfolio Manager, visit:

[http://www.energystar.gov/index.cfm?c=evaluate\\_performance.bus\\_portfoliomanager\\_docs](http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_docs)